ClientTrack™

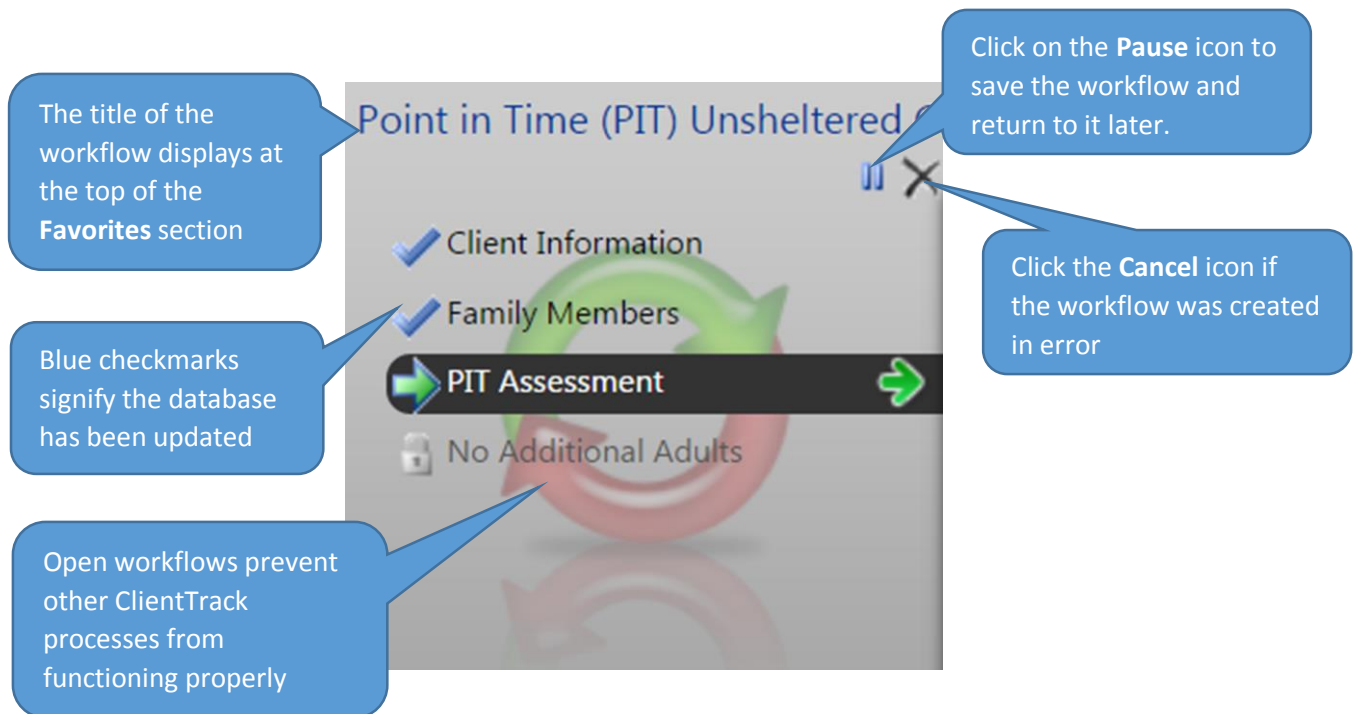## PA HMIS – Data Collection

This quick reference guide outlines the components of the ClientTrack HMIS solution related to data collection efforts.

Workflows

Workflows are designed to operate much like a software 'New Set-up Wizard'. By accessing this menu item, the user performs multiple tasks in a logical sequence without needing to manually navigate through several forms.

The title of the workflow displays at the top of the **Favorites** section

Click on the **Pause** icon to save the workflow and return to it later.

Point in Time (PIT) Unsheltered

✔ Client Information

✔ Family Members

➡ PIT Assessment ➡

🔒 No Additional Adults

Blue checkmarks signify the database has been updated

Click the **Cancel** icon if the workflow was created in error

Open workflows prevent other ClientTrack processes from functioning properly

Helpful Tip: Once items have been saved to the database, they must be manually deleted (even if the workflow is canceled).

Services

Services within ClientTrack are used to record a client's participation in the projects offered by the organization. Services are also used to record the organizations indirect interactions with members of the community not identified by the agency.

Home | Clients | Housing

Case Management «
- Client Dashboard
- ▶ Edit Client Profile
- ▶ Household Members
- DV Assessments
- ▲ Project Enrollments
  - Assessments
  - Enrolled Services →

The **Client Services** screen displays the clients open services

← 🔍 Client Services

The client's service history displays below. To record a service for only this client, click the **Add New Service** opt... across all household members, click the **Add Household Services** option. To edit or view an existing service, cli... record.

Please note that these are considered "enrolled" services and can only be associated to a client once they have been enrolled into a pro... ...ring the new service process the system will provide a list of projects the client is currently enrolled into to associate with the service.

The **Add Household Services** button facilitates multiple service entry

🕂 Add New Service | 🕂 Add Household Services

1 record found.

Service ▲	Start Date ▼	End Date ▲	Program Name ▲	Organization ▲
▲ Today (1 Services)				
Housing Bednight	10/21/2014	10/21/2014	HMIS Service - Emergency Shelter	HMIS Service Agency

The **Add New Service** button facilitates single client service entry

Single Client Service

Service Start Date:*	10/21/2014
Service End Date:	10/21/2014
Project Enrollment:*	10/20/2014 - HMIS Service - Emergency Shelter ▾
Service:*	Case Management ▾
Location:	HMIS Service Site ▾
Service Amount:*	$1.00
User Performing the Service:	Kamrin Carver
Service Notes:	

> Services can be added one at a time and attached to a single customer through the **Single Client Services** screen

Project Services for Household Clients

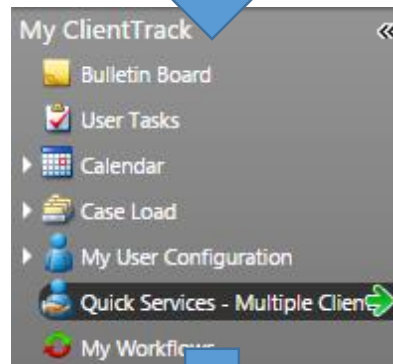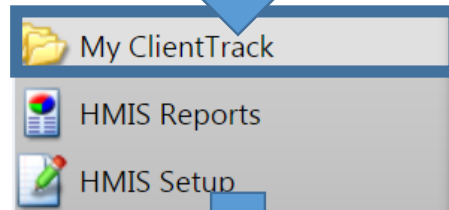|	
Service Date:*	10/21/2014
Service End Date:	
Project Enrollment:	10/19/2014 - HMIS Transitional Housing Program
Service:*	-- SELECT -- ▾
Location:	-- SELECT -- ▾
Service Amount:	
User Performing the Service:	Kamrin Carver
Service Notes:	

> Multiple family members can be added to a service at the same time through the **Project Services for Household Clients** form

🔍 Search

3 records found.

☐	Household Members △	Relationship △	Service Sharing	Restriction ❓△	
☑	Anderson, Pam	Self ▾	Shared	Do Not Share Transaction ▾	🔁
☑	Anderson, Ricky	Son ▾	Shared	Do Not Share Transaction ▾	🔁
☑	Anderson, Shania	Daughter ▾	Not Shared		🔁

Quick Services – Multiple Clients

Home   Clients   Providers

My ClientTrack

HMIS Reports

HMIS Setup

My ClientTrack   «

Bulletin Board

User Tasks

▶ Calendar

▶ Case Load

▶ My User Configuration

Quick Services - Multiple Clients →

My Workflows
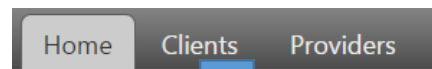
Quick Services for Multiple Clients

This form may be used to quickly record a service to multiple clients. Select a service screen and a specific service, date, and units that you would like to record. Once you have defined a service, you may use the search icon on each row below to find clients to post the se

Alternatively, you can select a program ... down list to pre-populate the rows with clients who are enrolled in a particular program as of the date identified in the service date. Simply check the box next to each client to record the service.

A single service can be added to many customers simultaneously through the **Quick Services for Multiple Clients** screen

Service Screen: HMIS Supportive Services ▼
Service: * Outreach ▼
Service Date: * 09/26/2014
Default Units: 1.00
Units Of Measure: * Count ▼
Unit Value: 1.00
Location: HMIS Service Site ▼
Provider:
User Performing the Service: Kamrin Carver
Program Enrollment: HMIS Transitional Housing Program ▼

The field selections above apply to each displayed customer below

4 records found.

☐	Client* ▲	Comments ▲	Units ▲	Enrollment* ▲	Restriction ❓ ▲
☑	Miller, Brian		1.00	09/15/2014 - HMIS Transitional Housing Program ▼	Do Not Share Transaction ▼
☑	Morris, Alfred P.		1.00	09/26/2014 - HMIS Transitional Housing Program ▼	Do Not Share Transaction ▼
☑	Struthers, Billy		1.00	09/26/2014 - HMIS Transitional Housing Program ▼	Do Not Share Transaction ▼
☑	Struthers, Sally		1.00	09/26/2014 - HMIS Transitional Housing Program ▼	Do Not Share Transaction ▼
☐				-- SELECT -- ▼	Do Not Share Transaction ▼
☐				-- SELECT -- ▼	Do Not Share Transaction ▼
☐				-- SELECT -- ▼	Do Not Share Transaction ▼
☐				-- SELECT -- ▼	Do Not Share Transaction ▼
☐				-- SELECT -- ▼	Do Not Share Transaction ▼

Add Lines 1